

# Making the Eight-Step Training Model Work

by Captain Jeffery L. Howard, Captain John F. Blankenhorn, and Captain Douglas A. Keeler Jr.

*“Leaders use the Eight-Step Training Model as their template for planning, preparing, executing, and assessing training. Just as we execute Troop Leading Procedures for tactical operations, execute the Eight-Step Training Model for training.”*

*I was assigned to the 1st Squadron, 5th Cavalry, and had just returned from a yearlong deployment. I arrived at home station with the realization that the skills needed to successfully accomplish our wartime mission essential task list (METL) had diminished. Lieutenant Colonel Thomas Jones, the new squadron commander, stepped into the squadron S3 shop Monday morning, after block leave, and asked, “Captain Smith, do you want to join Major Connor and myself in his office?” As the assistant S3, I had not been “invited” to many discussions with the S3 and the old man and I anticipated the worst. As he took a seat, the squadron commander opened with a simple statement, “Gentlemen, I know we returned only 2 weeks ago from a major deployment. You are aware of our current METL training needs. I feel we need to take an aggressive step forward to get the squad-*

*ron back on track.” Lieutenant Colonel Jones looked at both Major Connor and myself and announced, “I want the S3 shop to develop a squadron training plan within 2 weeks to get us training again. I want a “road to war” that maps out how the unit will regain its wartime readiness with the capstone exercise being a National Training Center Rotation.” With that, he jumped to his feet and turned to leave. “Well, I’d better get going, I have to restart my routine of meetings followed by more meetings. Come by my office around 1500 hours and I will provide guidance for the coming quarter. By the way, I just talked to an old buddy of mine in command at Fort Hood and he mentioned an eight-step model to guide training. You might find that useful. Later gentlemen, have a great day!”*

*As the assistant S3, I found that my experiences as a platoon leader, executive officer, and even as a graduate of the Armor Officers Advance Course and CAS3, did not fully prepare me for the complex task laid before me. The tools necessary to plan, resort, and execute training were not in my kit bag. Up to this point, I understood the importance of training, but*

*not the methodical way to ensure a successful training event. Taking Lieutenant Colonel Jones’ suggestion, Major Connor and I looked at this new stepwise technique to planning and executing training. That was my introduction to the Eight-Step Training Model. I now had the tools, but no instruction manual. After several miscues with the training plan and being asked to brief the S3 and squadron commander on this new model, I researched the Eight-Step Training Model. I found through research, trial and error, and coaching from superiors and peers, the following lessons that helped me use the Eight-Step Training Model to make our unit better.*

The Eight-Step Training Model is a relatively new rationale for the U.S. Army. Some members of the active force have used this concept for almost 10 years. Only recently has the model been approved for publication in doctrinal manuals.

A problem for many junior leaders is that doctrinal manuals do not provide explanations on how to use the model. Manuals simply show the methodology in graphic format and identify the steps.



Through research in doctrinal manuals, observations, and personal experiences, we determined that junior leaders need a more formalized explanation of the training model.

As leaders at all levels, it is our commission to ensure soldiers are properly trained. Many leaders struggle to plan training effectively. For years, we have been coached to be battle focused in our training and to understand the training cycle. There is little discussion on conducting detailed planning for each training event within the training cycle to create a battle-focused event. This article attempts to close the gap between understanding and applying effective training and provides a detailed examination and explanation of the Eight-Step Training Model.

The Eight-Step Training Model provides a sequence for planning, coordinating, and executing individual and collective training. This methodology fills the gap between what field commanders expect and what the formalized education system provides for training event planning and execution.

The information in this article explains the procedures and considerations for each step of the model. This article is based on a collective 12 years of research and practical experience. It is directed to young leaders in the Army charged with training soldiers. The methodology of the Eight-Step Training Model is applicable to all branch or military occupational specialty (MOS) training requirements. Leaders can use this sequence of planning and execution in small or large units and for field, garrison, or specialized training requirements.

You should take time to investigate this process and make it relevant to your organization. Start with the premise that every leader must understand how to plan effective training. As leaders of soldiers, it is the ultimate mandate to properly train America's young men and women to win on the battlefield and return safely to their homes. Tough training that meets or exceeds standards established by doctrine and regulations ensures this.

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benefit. Some results include an increase in morale, stability in retaining quality soldiers, and a potential reduction in adverse administrative actions. Soldiers want to remain a part of an intelligent team that trains hard and maintains a reputation for being mission ready.

Before embarking on the first step of the Eight-Step Training Model, we must understand three imperatives: training planning is conducted at all leadership levels to varying degrees; planning is a continual process; and finally, training time is precious and must be preserved. We must also understand there are various sources of directed training from higher levels of command that impinge on and complement a unit's total training time.

After taking these factors into consideration, and fully understanding their impact on effective training, the Eight-Step Training Model can be a successful tool if used properly.

### **Plan Training**

Determine the training priorities of your higher headquarters, two levels up, and those of your next higher headquarters. Analyze potential war plans and missions for the unit. These results will determine your unit's METL or critical task lists. Training planners at all levels must use their own METL and that of their parent unit, if it is a company or larger size unit. This ensures a focus on training those critical tasks that ensure wartime mission accomplishment.

From the same research, you develop training guidance derived from the METL

or critical task list, directed training, and a unit assessment. A firm grasp on higher level training guidance leads to the conduct of a deliberate unit assessment to determine current training levels in the organization. Research and information gathered from multiple sources allows the conduct of the unit assessment. Places to research include training and evaluation programs, combat training centers, after-action reviews (AARs), unit statistics, personal observations, and unit leaders. This assessment assists in determining training needed to improve the unit in areas identified as lacking in documentation.

Various techniques for conducting the assessment to determine current training levels in the unit include an informal process, which involves a simple discussion over coffee, or a formal assessment during a scheduled meeting with a specific agenda. Soldiers have great ideas and insights into the strengths and weaknesses of the unit. With a little massaging, these ideas can be vital to the plan. The ideas can foster ownership of the training plan and cultivate commitment to the plan's success. Continual unit assessments will determine the training plan's effectiveness.

Now it is time to determine the type of training the unit conducts and to what standards they execute. To do this, you must define the point of success, which can be found in doctrine, external guidance provided from higher headquarters, and current soldier focus and direction. Combine the defined point of success with the revised unit METL, external



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guidance, and unit assessment to create the commander’s training guidance.

Once training guidance is identified, it is then published. It is a living document or idea that needs dissemination to the lowest levels. Either written or verbal guidance is acceptable, depending on the unit level. Once the training guidance is published, you must analyze the product and identify the specific training events needed to accomplish your intent. Once training events are identified, use the unit’s training calendar to synchronize the events to available time. It is important that you communicate the vision

within the framework of a timetable. Once events are matched to a timetable, a “road to war” is created to guide you through the time period.

Constant review of the training guidance will ensure feasibility and applicability. For example, a company commander identifies a METL task from the battalion METL and applies it to the company METL. The commander ensures that the training considerations of higher-level leaders are addressed. The company commander then selects platoon critical collective tasks to train that support the company METL. A platoon leader then con-

ducts the same process by identifying key leader, crew, and individual tasks that support the platoon critical collective tasks. This ensures platoon preparation for a company-level training event. The platoon leader then plans platoon-level training to complete the required training prior to the company-level training event. This ensures soldiers and leaders are mentally and physically prepared to fully participate in the company event.

Strive to incorporate as much multiechelon training as possible. Integrate tasks that provide additional training synergy. This ensures units train tasks from the individual to the collective level. After thorough research, coordination, and resourcing, you can produce a document that addresses major issues and provides the higher commander, or staff-level planner, a snapshot of your proposed training events. This ensures that key planning and resource aspects are considered and addressed.<sup>2</sup>

### Training and Certifying Leaders

Completing the first step of the eight-step model provides focus on the tasks to be trained. Next, ensure that subordinate leaders are trained and certified. This step is vital — second only to conducting the AAR. Soldiers look to leaders for direction, confidence, and decisions in combat. The ability to understand the training subject matter is key for a trustworthy leader. It is important to certify leaders not simply to conduct certification of a subject matter expert but to train soldiers. Certifying unit leaders builds confident, respected individuals that superiors, peers, and subordinates look to for mission accomplishment.

Observer controller (OC) teams for a training exercise must also receive training and certification. This ensures a focus on critical areas of evaluation or observation. The key to future success of training starts with this step. If training and certification are not conducted to standard, overall training quality suffers. Some key points to remember during the training and certification process are:

- Involve all trainers, evaluators, and leaders.
- Identify leaders vital to training success.
- Identify skills that contribute to training success.
- Develop a plan to train leaders on the skills.
- Use a certification method to validate skill proficiency.
- Plan retraining and continuing training to maintain skills.

For example, a company commander identifies essential leaders and trainers involved in a training event. Soldier attendance is deemed essential and is communicated as such. The commander researches the skills needed to properly execute the training event. The commander conducts a “leaders teach” on administrating the training event and tactical scenarios. This allows leaders and trainers to comprehend how to train a particular unit and what the commander views as training success. This is otherwise known as the leader’s training objectives. The commander then moves to a terrain model, sand table, or terrain tarp and executes a leader’s back brief by key event. If time is available, the commander and subordinate leaders conduct a walk through of the event at the training site, which ties into the next step.

### Reconnoiter the Site

The training and certification is complete when all leaders and trainers have a thorough understanding of the training objectives, expectations, and skills needed to conduct an event.<sup>3</sup>

After leaders, trainers, and evaluators are certified, they must reconnoiter the site. A successful reconnaissance ensures that leaders, trainers, and evaluation teams understand what the training expectations are and where they may occur based on a trainee’s reaction to a stimulus. During the reconnaissance, ensure that the site meets the essential resource requirements for the planned training. In addition, you and key leaders can envision the overall mission and how the terrain effects the tactical or operational aspects of the training. The reconnaissance provides an opportunity to rehearse the training scenario on the terrain where the event will occur. Even a limited rehearsal provides unit leaders an opportunity to verify that administrative aspects and tactical scenarios are synchronized to fully support the training objectives. At the end of this step, you can produce necessary graphics or terrain products.

One possible sequence starts with a commander determining that the unit requires training on reaction to indirect fire during dismounted operations. The commander then determines the stimulus necessary to produce a reaction or outcome that meets the training objective and standard. In this case, a barrage of artillery simulators and direct fire from a machine-gun position delivered by an opposing force provides the training scenario stimulus. During reconnaissance of the dismounted training lane, key leaders, trainers (opposing force leaders), and evaluators determine the best location to situate an ambush in the lane. The trainers and

leader shape the training lane and the ambush site to elicit a reaction from the unit executing the training. Trainers also select alternate sites for the ambush and artillery in the event the training unit’s tempo of execution is different than anticipated, or the original site is bypassed or compromised. Sites are recorded for incorporation into an enemy situation template or other products.

### Issuing the Plan

The fourth step of the model, issuing the plan, occurs after planning and coordination is complete. This step is time sensitive. Issue the operations order (OPORD) timely to allow subordinate leaders time for Troop Leading Procedures, and sufficient time for preparatory training and logistics preparation. Information in the OPORD that is as accurate as possible and published timely, promotes event success. An 80-percent solution on time is better than a 100-percent solution too late. Issue the plan in an OPORD format with standards and the training end-state clearly defined.

The OPORD communicates information and provides an opportunity for embedded training by allowing subordinate leaders to analyze the order, produce and brief an order, and conduct back briefs.

A successful method is to issue a training event OPORD prior to the event that explains the event, issues instructions for conducting the training, and denotes necessary coordination. This is separate

from the tactical order that drives the scenario for training. Develop the tactical order separately and issue it as a fragmentary order (FRAGO) during the training event or as an annex to the base training event order.

### Rehearsal

Never underestimate the value of a rehearsal — a critical step in every training event. Never bypass an opportunity to rehearse to save time or resources. When developing the training event timeline, include adequate time for detailed rehearsals prior to execution of the training. Strive for multiple dry runs prior to execution. In a compressed timeline, insist on a minimum of one dry run. Use imaginative rehearsal techniques to build soldier and leader confidence. Interweaving twists during execution will test leader reaction and initiative. If possible, rehearse on the terrain where the training event will occur.

Many types of rehearsals exist. Decide on a technique based on time available and the amount of unit participation. It is best when more than one type of rehearsal is used while preparing for a particular training event. The best methods for rehearsing allow hands-on participation by the entire unit. The unit develops a mental picture of the training event with a good rehearsal. This helps soldiers and leaders better understand the operation, contingencies, and actions/reactions for various situations that may arise. The rehearsal level is a sliding continuum var-



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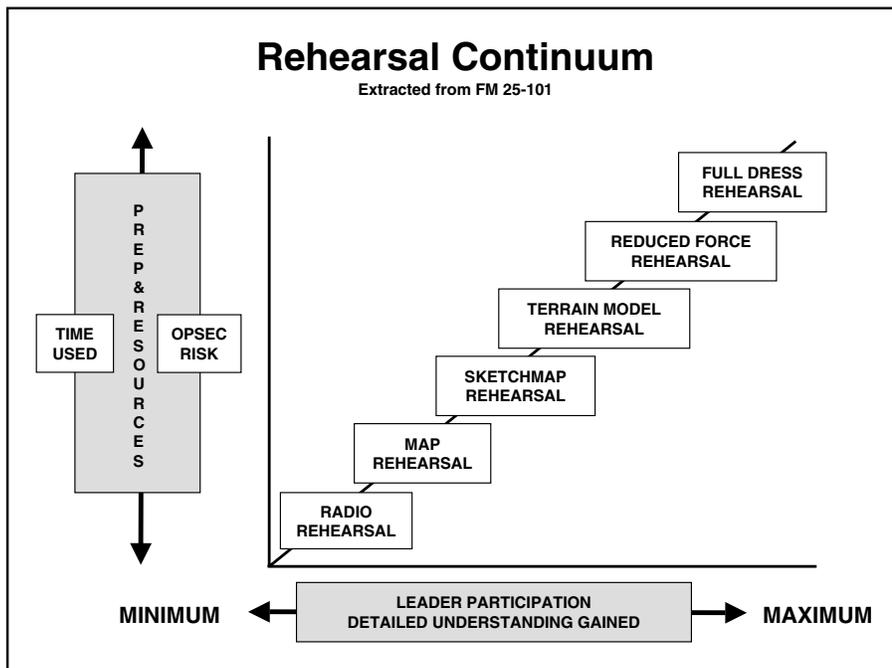


Figure 1

ied by time available, participation, and level of understanding.

An example of executing an event rehearsal incorporates several techniques. Begin with a concept sketch or graphics to allow subordinates to envision the training event either from an execution or tactical standpoint. Then move to a map, with graphics, and review the concept to allow subordinates to develop an appreciation for the terrain. After subordinates have an understanding of the terrain, move on to discussing the training event by phase. Focus on the tactical aspects of the training. Once subordinate leaders understand the overall concept of the operation, move to the training site and conduct a tactical exercise without troops (TEWT). This rehearsal is conducted with a similar scenario, if not the same scenario, that will drive the training event. When the TEWT is complete, all subordinate elements can conduct a similar sequence of rehearsals. Once they are ready, the entire unit can conduct a coordinated rehearsal. This rehearsal can take a variety of forms such as mounted, dismounted, key event, dry run, or full scale. A clear understanding of the training event signals the end of the rehearsal step.<sup>4</sup>

### Execution

Move into execution only when the unit has a clear understanding of how to execute the training. The unit must have all prerequisite training and necessary resources to establish the right conditions for training. The execution plan must allow for multiple repetitions and for an incremental increase to training-condition challenges. A key to successful exe-

cutio is to focus on the published standards. A direct correlation between expectations and results exists. Set high, realistic expectations and hold subordinates to them.<sup>5</sup>

### The After-Action Review

The AAR is the most important part of the Eight-Step Training Model. The unit must receive a complete AAR from the OC or training leader during the training event. Conduct the AAR during, or immediately following, a training iteration. As this is the most important of the eight steps, the AAR must be a professional discussion with active participation from the soldiers of the training unit. The full-learning process begins during the AAR. It is important for all AAR facilitators to learn methods for conducting a structured review. Facilitators require the appropriate tools to coach soldiers into self discovery concerning what happened, why it happened, and how the unit can improve performance during current training events and future training events. Ensure the AAR facilitator plans and rehearses the main AAR points prior to presentation. A facilitator may employ methods that include a detailed terrain model, an easel that outlines a specific set of training objectives, a slide show, or a HMMWV-top briefing book.

Ensure the AAR facilitator captures critical behaviors to sustain and improve. It is important to identify what occurred, but more critical is why the event occurred. The AAR provides candid insight into specific soldier, leader, and unit strengths and weaknesses from various perspectives. The facilitator guides and focuses soldiers into articulating “what

and why.” Soldiers can then determine specific behaviors to sustain and improve. The unit can develop a strategy for improvement and identify an enforcer for the strategy. Insist the AAR remains focused on the identified training objectives. The AAR facilitator involves all participants in the discussion by using open-ended questions. By focusing on the action and standards, and by describing specific observations, leaders and soldiers identify strengths and weaknesses and decide together how to improve performance.

Use an informal AAR as an on-the-spot coaching tool while observing soldier and unit performance. For example, after a scout section destroys an observation post during a zone reconnaissance, the platoon leader can conduct an informal AAR to make corrections and reinforce strengths. The section quickly evaluates the performance against a published standard, identifies weaknesses, and decides how to improve performance. The section can implement the corrections and see immediate improvement when training resumes. This provides a rapid-feedback process to reinforce correct procedures. An informal AAR can maximize training value because units receive quick feedback during the event and soldiers can immediately improve their actions. A successful AAR begins early and incorporates:

- Planning.
- Preparing.
- Conducting.
- Follow-up (using AAR results).<sup>6</sup>

Planning begins with selecting and training leaders on the AAR process. The facilitator and leaders identify when the AAR will occur, who will attend, the potential site, and produce training aids during the planning phase. The AAR plan identifies observers, AAR facilitators, critical places and events to observe, attendees, and required training aids.

Initial AAR preparation includes a review of training objectives, orders, METL, and doctrine. From the AAR plan, the facilitator and OCs identify, record, and communicate information on key events. The collected information is organized and packaged to present key discussion or teaching points. Preparation also includes reconnaissance and preparation of the AAR site and AAR rehearsal.

While conducting the AAR, always seek maximum participation, maintain focus on the training objectives, constantly review teaching points, and then record key points. One of the strengths of the AAR format is its versatility. However, remain specific, thorough, and avoid gen-

eralizations. Do not dwell on issues unrelated to mission accomplishment. Trainers must ensure AARs are focused on training actions. Facilitators must relate performance to accomplishment of training objectives. An AAR format should include:

- Reviewing the training objectives.
- Commander's mission and intent.
- Introduction and rules.
- Relevant doctrine and tactics, techniques, and procedures (TTPs).
- Summary of recent events.
- Discussion of key issues.
- Discussion of optional issues.
- Discussion of force protection issues.
- Closing comments.

Follow-up is the most vital part of the AAR process. During an AAR, leaders determine aspects of training to improve on. The unit begins to address the areas through action. This can encompass revising standing operating procedures or changing TTPs. It is important for the unit to determine improvement needs, develop a strategy to make improvements, and then implement the strategy. Identifying a problem and a solution means little if the solution is not implemented. Begin with small improvements immediately and work toward major corrections. The facilitator ensures the unit identifies an individual responsible for improvements. The unit's improvements should be monitored during subsequent training.

## Retraining

After completing the AAR process, participants collectively determine one or two tasks for immediate improvement during the final step of the eight-step model. Any training plan devised for a unit must incorporate retraining into the critical training tasks and timeline. Too much negativity is placed on the term "retraining." The term often denotes failure, poor performance, or not measuring up in the eyes of a leader. These connotations are not the true spirit of retraining. We must think of this step as "reinforcement" training. Communicate the positive aspects of the completed mission to subordinates during the AAR process and stress the importance of building on these. Continued training allows the unit to improve warfighting skills and increase their confidence in mission accomplishment. Point out that mission success means a mission trained to standard.

Protect time set aside for retraining to ensure the unit is not deprived of the opportunity to achieve or exceed the standard. Use this step to raise the high bar or to step back and ensure success with

the basics. Reinforcement training is an opportunity to challenge a unit that needs additional challenges. This is also an opportunity for unit leaders to fix those one or two key tasks identified during the AAR. The retraining process is a never-ending cycle, always look back to completed training and find something to improve. With this understanding, do not view, or use, retraining as a punishment. It is a confidence-building opportunity. It is key to take the opportunity to reinforce positives and fix negative aspects of training and end the event with success and unit improvement.<sup>7</sup>

Nothing in this article is revolutionary, but the Eight-Step Training Model is an emerging rationale for the U.S. Army. The model presented to you in this article has roots firmly planted in U.S. Army Field Manual (FM) 7-0, *Training the Force*.<sup>8</sup> Properly using the Eight-Step Training Model allows leaders at all levels to improve their planning and execution of training.

Soldiers perform better when they understand what they are doing, why they are doing it, and how it ultimately allows them to perform essential functions — functions that may ensure their survival in combat. Use the training model not only for tactical training events, but also for garrison training such as sergeant's time or administrative taskings.

The use of the eight-step process by junior leaders during training planning also correlates with the use of Troop Leading Procedures during training and in combat. The similar sequential process of planning and execution allows junior leaders to develop a pattern of analyzing missions and fully preparing for them.

Remember the most important steps of the Eight-Step Training Model are training and certifying leaders and the after-action review. This model establishes a sequence for trainers to follow, at all echelons, to improve planning through the execution of training events. As stated in FM 7-0, "Training to the Army standard is the key to fighting and winning. Every commander and leader from squad through Army is expected to know, understand, and apply this capstone training doctrine."<sup>9</sup> Training excellence is the cornerstone of combat readiness. An ancient Chinese proverb simply states, "The more you sweat in training, the less you bleed in war." We must learn the model, use it, and train others. This can create a streamlined, logical planning process leading to the most important thing in the Army...winning in combat!



## Notes

<sup>1</sup>General Thomas A. Schwartz, U.S. Army Forces Command Training White Paper, Subject: Train to Fight...Fight to Train, <http://www.forscom.army.mil/cgwelcome/WhitePapers/default.htm>.

<sup>2</sup>U.S. Army Field Manual (FM) 7-0, *Training the Force*, U.S. Government Printing Office (GPO), Washington, DC, 21 October 2002, pp. 3.1-3.15.

<sup>3</sup>Army Training and Evaluation Program (ARTEP) 17-237-10-MTP, *Mission Training Plan for the Tank Platoon*, GPO, Washington, DC, 23 December 2002, p. 1-11.

<sup>4</sup>FM 101-5, *Staff Organization and Operations*, GPO, Washington, DC, 31 May 1997, p. G-3.

<sup>5</sup>Christopher D. Kolenda, *Leadership: The Warrior's Art*, Army War College Foundation Press, Carlisle, PA, 2001, pp. 309-326. Contribution from BG Robert W. Cone, Chapter 17, "Battle Focused Training."

<sup>6</sup>Training Circular 25-20, *A Leader's Guide to the After Action Review*, GPO, Washington, DC, 30 September 1993.

<sup>7</sup>Kolenda, pp. 323-325.

<sup>8</sup>FM 7-0.

<sup>9</sup>Ibid.

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